

Road Map to Success – Chapter President

Year-at-a-glance checklist to help you learn and carry out your chapter leader role

Thank you for choosing to share your time and skills as a Thrivent chapter leader. Here is a checklist of tools and resources designed to help you be successful in your role. You may **also want to review the “[All Roles](#)” checklist** for items that apply to all chapter leadership board roles. Remember, chapter leader responsibilities can be shared or overlapped to suit the needs of your own chapter leadership board.

The key to the abbreviation icons **R** **T** **CHIP** are listed below. Clicking on an icon or any underlined words in this document will either take you to its online location or directly to the document.

Tools to increase your knowledge of the role and related topics	Tasks to complete as part of your role
<ul style="list-style-type: none"> <input type="checkbox"/> If you are a new leader, view the <i>New Volunteer Leader Orientation webinar</i> on Volunteer Leader Resources. R T <input type="checkbox"/> View the <i>President role-specific training webinar</i> on Chapter Leader Roles. R T <input type="checkbox"/> Review Understanding Your Role – President R for details about your role. <input type="checkbox"/> Browse the following areas in the Volunteer Leader Resources area of thrivent.com: R <ul style="list-style-type: none"> For Chapter Leaders Forms & Conducting Activities Ask CHIP <input type="checkbox"/> Review the following topics in CHIP: CHIP <ul style="list-style-type: none"> Privacy Policy Thrivent Financial Logo Use and Naming Guidelines Co-hosting activities guidelines & reporting Leadership board: term limits—staggering terms Chapter elections Recruiting volunteers Volunteer leader eligibility (conflicts of interest) <input type="checkbox"/> Work through Administration Overview and Requesting Funds and Reporting Activity Results, short, easy-to-complete tutorials. R 	<ul style="list-style-type: none"> <input type="checkbox"/> Register for a user ID and password to access the Chapter Leadership Administration Menu online. See How to Create a My Thrivent Account R for details. <input type="checkbox"/> Print Chapter Calendar and check periodically. R <input type="checkbox"/> Read the monthly Chapter News e-mails and periodic e-mails from your Lutheran Engagement Team (LET) and Thrivent Financial. R <input type="checkbox"/> At the first chapter meeting, take the lead on doing/discussing the following with the rest of the board: <ul style="list-style-type: none"> ○ Discuss and schedule a regular time, date and location for chapter board meetings for the year. CHIP Search “<i>meeting requirements</i>”, “<i>meetings</i>” ○ Review the Thrivent Financial mission statement. Start a conversation on the chapter planning process. <i>Note: 2012 chapter planning tools will be available in January.</i> ○ Discuss the Responsibilities of the Leadership Board and the roles of each of the chapter leaders and plan who will do what in the coming year. R ○ Review/establish chapter guidelines on how the board will handle funding requests, promoting activities, budget operating funds, etc. R ○ Discuss and schedule large events/functions (e.g chapter educational and social events). CHIP Search “<i>educational</i>”, “<i>social</i>” ○ Admit new chapter members and leaders (at every meeting as needed). CHIP Search “<i>admit</i>”, “<i>install</i>” ○ Ask for updates on service teams with activities planned or in progress at each meeting. ○ Ensure the previous year’s annual chapter audit is completed by Feb. 28. CHIP Search “<i>audit committee</i>” ○ Ensure the year-end Chapter Summary Report is signed and submitted to Thrivent Financial by the Feb. 28 deadline. CHIP Search “<i>chapter summary report – instructions for using</i>”

	<ul style="list-style-type: none"> ❑ Review/create a succession plan for the chapter leadership board (e.g. stagger terms) CHIP Search “<i>stagger</i>”, “<i>term limits</i>” ❑ Recruit Chapter Leaders to fill next year’s vacancies. R ❑ Planning for annual election. Can delegate to Events Director or Vice President. CHIP Search “<i>chapter election</i>” <ul style="list-style-type: none"> ○ Verify that election event is scheduled and planned. ○ Verify that at least all required positions will be filled for next year. CHIP Search “<i>required positions</i>” ○ Report election results - verify new chapter board information is entered online by Dec. 31. R ❑ Attend local or regional training events provided by your LET team as available.
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Key

- R** Resources for members and volunteers.
- T** Computer-based learning modules.
- CHIP** Online chapter reference tool. Click on “Ask CHIP.”

Questions? The Member Connection Center is available to answer your questions.

- Call 800-THRIVENT (800-847-4836) and say “Fraternal” between 7 a.m. and 9 p.m. Central time, Monday—Friday or email fraternal@thrivent.com